

**S.P.O.A.**

Quick Start Guide  
& Manual

(Version 2.0)

Interactive Quick Start Guide & Manual

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## Section 1.0: Browser requirements to run SPOA

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A highly detailed outline of all system requirements to run the SPOA application off of Salesforce.com [is provided right here](#) and should be shown to your local IT specialist if your browser is having continuing trouble.

To sum up what is most applicable to SPOA requirements; the compatible browsers include:

- **Google Chrome** (any version)
- **Mozilla Firefox** (version 3.6 and up)
- **Windows Internet Explorer** (8 and up) (the most updated version of 8)
- **Apple Safari** (version 5.0.x and up)

## Section 2.0: Your SPOA login site

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There is now one unified way to access SPOA.

- This [official SPOA login page found here](#).

## Section 3.0: SPOA Account Setup

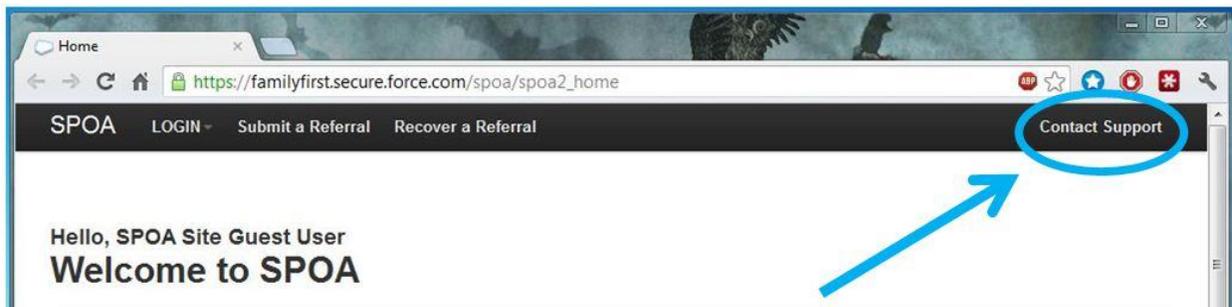
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For the majority of individuals already associated with SPOA, their SPOA account was created automatically when the system was launched (09-20-2011). It is at this point that an e-mail was generated by the SPOA System to those accounts, to aid them in creating their passwords.

To test if you were one of these accounts, please surf on over to the [Password Reset-or-Forgotten page right here](#), and use your e-mail as your username to attempt to reset your password. At this point, it will either go on to reset your password, or show you an error, stating that your username was not found.

If your username was not found, then please feel free to request your SPOA account by browsing over to the SPOA site and clicking [Contact Support](#), as depicted below. **Please include** whether you are requesting access for the purposes of *Housing*, *Care Coordination*, or just the *Authenticated Referrer* role. And don't forget to **include the name of the Organization** you are working for. You will be contacted by the system to make your password when the account goes live.

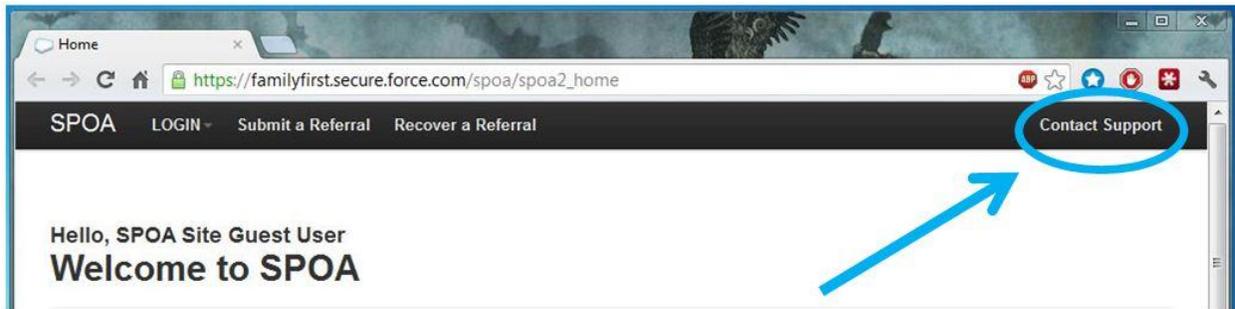
★ **Note:** If you are still having trouble with the account after the steps taken above, please contact us through the [Contact Support](#) link found at the top of any SPOA page – like in the following picture:



## Section 4.0: Reporting issues with the online SPOA system

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To report any issues with the website SPOA system, please contact us through the [Contact Support](#) link found at the top of any SPOA page – like in the following picture:



This sends a single ticket before the eyes of the entire support team.

**Please do not use direct e-mail to any support personnel for any new or aged support request.** Only use the [Contact Support](#) link on your page.

As there is absolutely no way to assure that any single support individual will be present or available for support. But when you submit using the [Contact Support](#) link, it goes to the entire team, and the first available person takes your case as soon as possible.

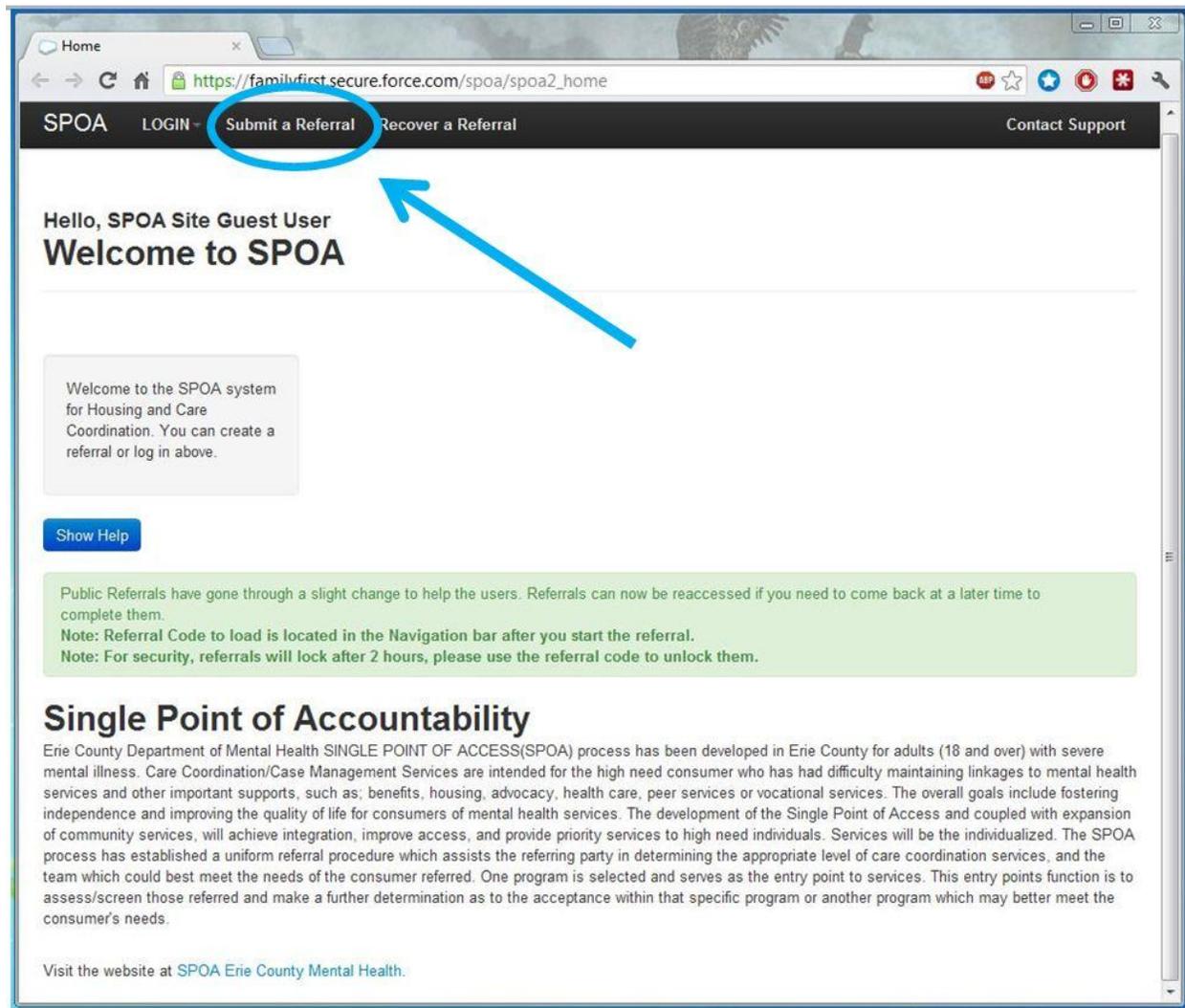
**No support can be assured if you do not use the [Contact Support](#) link**, as the entire team will never see that you're having an issue, nor will there be any record of it other than your e-mail.

**When in doubt, use the [Contact Support](#) link.**

## Section 5.0: Quick Start as a Public Referrer

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A public referrer starts out [at this web page here](#), which is also displayed in **(Figure 1)** below, from where they click on the [Submit a Referral](#) link highlighted therein below.



**(Figure 1)**

The next step is [\(Making a Referral\)](#) <- (please click link)

## Section 6.0: Quick Start as an Authenticated Referrer

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★★ **Note:** The following is a Quick Start Guide to the Authenticated Referrer.

After they log in, an Authenticated referrer starts out at the page in **(Figure 2)**, which is where you will see any referrals that you have saved and not yet submitted. **The key difference between an Authenticated and a Public referrer is the ability to save partial referrals, and observe the live status of previously submitted referrals.**

The screenshot displays the 'My Pending Referrals' page in a web browser. The browser's address bar shows the URL: [https://familyfirst.staging.cs10.force.com/spoa/apex/spoa2\\_home](https://familyfirst.staging.cs10.force.com/spoa/apex/spoa2_home). The page header includes 'SPOA', 'Logout', 'Submit a Referral', and 'Contact Support'. On the left, there is a help box with instructions on how to search for referrals. The main content area features a search bar and a 'Next' button. Below this is a table with the following data:

Encounter	Name	Phase	Is Incomplete	Incomplete Reason
E-044168		Draft		
E-044182		Draft		
E-044185		Draft		
E-044210		Draft		

**(Figure 2)**

When you go to open a client on this page, like a pending, or incomplete referral, you will come to the client page seen in **(Figure 3)**, on the next page; from where you will see your completion progress, and own information in the Referrer section and be able to fill the rest out.

SPOA HOME SPOA Administration Referrer Client Episodes Attachments Print Referral Contact Support Reports

### Care Coordination Phase: Referral ?

Red Flags	Critical Markers
Red Flag Score: 3	Client's Time In SPOA: 2 days
Instances of Homelessness within the last year: 0	Current Housing Situation: Lives with friends
Lethality risks within the last year: 0	Current Employment Situation: Unknown
Arrests within the last year: 0	Current Legal Situation: Unknown
Incarcerations within the last year: 0	Referred For:
ER Visits within the last year: 2	Axix I Diagnosis: 295.7 Schizoaffective Disorder
Hospitalizations within the last year: 0	
Psychiatric ER Visits within the last year: 1	
Psychiatric Hospitalizations within the last year: 0	

This section contains the general potential risks the client poses to themselves or others.  
 Notice: There can also be other legal and lethality records below.

[Update Risks](#)

### Potential Risk to Self / Others

Title	Start Date	Type	
A history of indiscriminate serious assault	7/8/2011	Incident	<a href="#">edit</a>
A history of indiscriminate serious assault	6/1/2007	Incident	<a href="#">edit</a>

[back to top](#)

Click on notes to add notes for other SPOA Administrators or to communicate to the agencies with notes about this case.

[Add Note](#)

### Notes

Title	Details	Date Created	SPOA Only?	
Tara Karoleski	Email sent to referrer. I am in the process of reviewing your referral for Marc. I am curious as to why [REDACTED] Tara	8/28/2012 11:43 AM	1/1	<a href="#">edit</a> <a href="#">delete</a>
Tara Karoleski	will review in psyckes	8/28/2012 11:26 AM	1/1	<a href="#">edit</a> <a href="#">delete</a>

### Referrer details...

It is important for us to be able to contact  First Name  Last Name

(Figure 3)

## Section 7.0: Quick Start as an Agency Supervisor

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★★ **Note:** The following is a Quick Start Guide to the Agency Supervisor.

After they log in, an Agency Supervisor starts out at the page in **(Figure 4)**, which is where you will see several items that are explained under the.

The screenshot shows the SPOA Agency Supervisor dashboard. At the top, there is a navigation bar with 'SPOA', 'Logout', 'Agency Supervisor', 'Submit a Referral', and 'Contact Support'. The main content area is divided into three sections:

- Unassigned Encounters:** A section with a search bar and a table of 3 records. The table has columns: Referral Id, Name, Phase, CTI, Date Added, Care Level, and Team. The records are: E-044157 (Kelly Monroe), E-044199 (test1 test2), and E-044276 (Pyotr Tchaikovsky).
- My Clients:** A section with a search bar and the text 'No results.' Below it is a 'back to top' link.
- Active Agency Clients:** A section with a search bar and a table of 7 records. The table has columns: Referral Id, Name, Care Level, Coordinator, Team, Phase, Engagement Date, Enrollment Date, and CTI?. The first record is E-044156 (David Monroe) with Coordinator Mikhail Nitko and Team Test.

**(Figure 4)**

The items seen above, top to bottom, are the as follows:

**A)** View your **Unassigned Encounters**; these are cases SPOA has assigned to your agency that now need to be assigned to a coordinator or supervisor in your agency.

**B)** In the **My Clients** section you can view and update any Engagement /Enrollment efforts associated with individuals assigned under your name.

**C)** In the **Active Agency Clients** section you will see ALL individuals who are accepted and currently being managed by your organization.

**D)** In the **Requested Disengagements** section, if you have one, you will see any individual from your agency that had a request to Disengage from the

Engagement phase. This request is automatically received by SPOA. SPOA will determine if the disengagement is approved, or the client should be engaged by another agency or level of service. If SPOA determines that the engagement efforts should continue with your agency, the individuals name will show up on your **Unassigned Encounters** list.

**E)** In the **My Pending Referrals section**, if this is part of the tasks you perform, you will see the referrals you submitted which are currently pending SPOA approval.

From here, you may click on through into clients and see the page seen in **(Figure 5)**, where you may view and review them.

The screenshot displays the SPOA web application interface for a referral. The navigation bar at the top includes: SPOA, HOME, SPOA Administration, Referrer, Client, Episodes, Attachments, Print Referral, Contact Support, and Reports.

**Care Coordination Phase: Referral ?**

Red Flags	Critical Markers
Red Flag Score: 3	Client's Time in SPOA: 2 days
Instances of Homelessness within the last year: 0	Current Housing Situation: Lives with friends
Lethality risks within the last year: 0	Current Employment Situation: Unknown
Arrests within the last year: 0	Current Legal Situation: Unknown
Incarcerations within the last year: 0	Referred For:
ER Visits within the last year: 2	Axix I Diagnosis: 295.7 Schizoaffective Disorder
Hospitalizations within the last year: 0	
Psychiatric ER Visits within the last year: 1	
Psychiatric Hospitalizations within the last year: 0	

**Potential Risk to Self / Others**

This section contains the general potential risks the client poses to themselves or others. Notice: There can also be other legal and lethality records below.

[Update Risks](#)

Title	Start Date	Type	
A history of indiscriminate serious assault	7/8/2011	Incident	<a href="#">edit</a>
A history of indiscriminate serious assault	5/1/2007	Incident	<a href="#">edit</a>

[back to top](#)

**Notes**

Click on notes to add notes for other SPOA Administrators or to communicate to the agencies with notes about this case.

[Add Note](#)

Title	Details	Date Created	SPOA Only?	
Tara Karolecki	Email sent to referrer: I am in the process of reviewing your referral for Marc. I am curious as to why [REDACTED]	8/28/2012 11:43 AM	<input type="checkbox"/>	<a href="#">edit</a> <a href="#">delete</a>
Tara Karolecki	will review in psyches	8/28/2012 11:26 AM	<input type="checkbox"/>	<a href="#">edit</a> <a href="#">delete</a>

**Referrer details...**

It is important for us to be able to contact  First Name  Last Name

**(Figure 5)**

(Section Continued on Next Page)

By clicking on any client in the Active Agency Clients section, depicted in **(Figure 4)**, you will be allowed to *view a client's Risk score, begin disengagement, begin disenrollment, or edit any information* on your agency's client. You will also be allowed to edit the CTI Plan, which is thoroughly covered in the **(Critical Time Intervention (CTI))** section of the Guide & Manual.

The screen demonstrated in the below graphic:

**David Monroe (024839)** referred on: 2/28/2012 10:32 AM

**Requests:**

Red Flags	Critical Markers
Red Flag Score: 5	Client's Time In SPOA: 5 months, 23 days
Instances of Homelessness within the last year: 1	Current Housing Situation: Unknown
Lethality risks within the last year: 2	Current Employment Situation: Unknown
Arrests within the last year: 1	Current Legal Situation: Unknown
Incarcerations within the last year: 0	Referred For:
ER Visits within the last year: 0	Axis I Diagnosis: Axis I
Hospitalizations within the last year: 0	
Psychiatric ER Visits within the last year: 1	
Psychiatric Hospitalizations within the last year: 0	

**Potential Risk to Self / Others**  
No results.

[back to top](#)

The notes section has information from SPOA Administrators about this case. Please take these into consideration when reviewing and planning for this client's care

**Notes**

Title	Details	Date Created
test 3	public	3/2/2012 10:47 AM
test	public	3/2/2012 10:47 AM

[Disengage](#) [Disenroll](#)

## Section 8.0: Critical Time Intervention (CTI)

[\(Main Menu\)](#)

Firstly, whether a client is eligible for CTI and whether they are simultaneously eligible for Pre-CTI, is determined by the SPOA Administration after receiving your referral.

The CTI functionality, that is, to either **Begin** or **Edit** a CTI plan for a client begins from inside of a client's current episode. Below are the shown 2 variations, one, **(Figure A)** where you may add a **Focus Area** and/or **Begin** CTI without it, and the other, **(Figure B)**, where you may begin to **Edit** the CTI plan.

- ★ Please **note** that the Phase dates you see when you Begin a CTI are automatically generated along the structure of the CTI model, and are based on the date you select to start, or change to reflect as the start of your CTI program. The "actual Phase Start Date" functionality, where you may change the date, is depicted in **(Figure F)** below.
- ★ Please **note** that it is important to fill out a Focus Area before you begin CTI- as it will dictate the **very reason the CTI exists** and show you how the process is supposed to flow, in the Phase explanations on the left hand side of the page. It is depicted below in **(Figure C)**.
- ★ Please **note** that you will need to move your client from CTI Phase to CTI phase by closing the previous phases yourself. This button is depicted in **(Figure B)**.

### Pre-CTI



The screenshot shows the 'Pre-CTI' section. On the left, there is a button labeled 'Begin CTI' which is circled in blue with an arrow pointing to it. To the right, under the heading 'Focus Areas and Linkages', there is a table with columns: Focus Area Name, Focus Area Type, Linkage Name, and Linkage Type. Below the table, there is a button labeled 'Add Focus Area' which is also circled in blue with an arrow pointing to it. A link '[ back to top ]' is visible in the bottom right corner.

**(Figure A)**

### Critical Time Intervention



The screenshot shows the 'Critical Time Intervention' section. On the left, there is a text box describing CTI. On the right, under the heading 'CTI Phases + Service Plans', there is a table with columns: Phase, Projected Start, Actual Start, Projected End, and Actual End. The table has four rows: Pre-CTI, Phase One, Phase Two, and Phase Three. To the right of the table, there are three buttons: 'view service plan', 'edit service plan', and 'close phase'. The 'edit service plan' and 'close phase' buttons are circled in blue with an arrow pointing to them.

Phase	Projected Start	Actual Start	Projected End	Actual End
Pre-CTI		2/28/2012		2/28/2012
Phase One	2/28/2012	2/28/2012	4/28/2012	2/28/2012
Phase Two	4/28/2012	2/28/2012	6/27/2012	
Phase Three	6/27/2012		8/26/2012	

**(Figure B)**

(Section Continued)

SPOA SPOA : CTI Focus Area return to Service Plan return to Referral print Focus Area Contact Support

## New Focus Area

**About Focus Area**  
A Focus Area outlines a category of support for a Client by defining a goal and aligning Linkages to achieve the goal. Progress Notes are written in the context of Focus Areas to document the progress against the goal.

**Pre-CTI Phase Notes**  
Prior to discharge from an institution, CTI worker collaborates with client, family members, institution staff, and community based supports to build rapport to enhance an effective transition.

**Pre-CTI Worker Activities**

- Review institutional chart including history
- Meet at least 1x/mo in institution
- Complete intake assessment form
- Determine most immediate needs

**Phase 1-Transition**  
Provide person w/intense support and assess existing community resources. Transition support to resources in community. Build strong community linkages and durable support system.

**Phase 1 Worker Activities**

- Intense contact w/person, home visits
- Create Service Plan in 1-3 focus areas based on most critical

Service Plan

Status **required**  
Inactive

Title **required**

Reason

Notes

(Figure C)

★ Please **note**, if you have any questions about a client's CTI eligibility determination, please contact Tara. The contact information is in the Contacts section of this document.

As you traverse the Service Plan after selecting to Edit it, you will have the options to Add Focus Areas, add linkages, add progress notes and thusly remove any of the three. The highlighting of these functionality pieces may be seen in (Figure D) below.

★ Please **note** that you are able to add as many progress notes as you desire, during any portion of CTI.

Per your training you are informed that a client must have at most 3 separate areas of focus during their CTI- however, you are also free to change, deactivate, or close any focus area you chose at any point. Some of these functions may be done from inside of a focus area, as highlighted in (Figure C) or executed while viewing the CTI plan overview as seen in (Figure D) below.

(Section Continued)

### Service Plan

Created by: SPOA Agency X Supervisor  
Last Modified by: SPOA Agency X Supervisor

Projected Phase Start Date 8/22/2012	Actual Phase Start Date 8/22/2012	Projected Phase End Date 10/21/2012	Actual Phase End Date
---	--------------------------------------	--	-----------------------

**New Feature: Progress Note and Focus Area Relationships**

Good news! Progress Notes can now be related to multiple Focus Areas in CTI. You can now assign one or more Focus Areas to a Progress Note with the new "Add Focus Area" picklist. This work very similarly to the current "Add Attendee" feature.

You'll also notice Progress Notes have their own section on this page (see below), so it's easier to create and manage your Progress Notes.

All of your previous Progress Notes should still be listed here and should still be related to their original Focus Area. If you run into any issues, please Contact Support via the link in the toolbar.

### Progress Notes

### Focus Areas

Note: There is a limit of three active Focus Areas on a Service Plan.

**Test 1** Medical Focus Area In Progress Edit Print Add Linkage Close Deactivate

Linkages								
Title	Type	Status	Start	End	Frequency	Cost	Contacts	

**Test 2** Housing Focus Area In Progress Edit Print Add Linkage Close Deactivate

Linkages								
Title	Type	Status	Start	End	Frequency	Cost	Contacts	

(Figure D)

★ Please **note** that SPOA progress note functionality is quite advanced and you should take full advantage of it. An example of the screen is below, and you should take some time to explore the menu system in this layout, as you may find it allows you to record more detail with more accuracy than systems you may have previously experienced. It is exemplified in the below (Figure E).

(Section Continued)

# Progress Note for

### About Progress Notes

Progress Notes collect information about interactions with the Client and the support network in the context of a Focus Area.

### Pre-CTI Phase Notes

Prior to discharge from an institution, CTI worker collaborates with client, family members, institution staff, and community based supports to build rapport to enhance an effective transition.

### Pre-CTI Worker Activities

- Review institutional chart including history
- Meet at least 1x/mo in institution
- Complete intake assessment form
- Determine most immediate needs

### Phase 1-Transition

Provide person w/intense support and assess existing community resources. Transition support to resources in community. Build strong community linkages and durable support system.

## Progress Note Details

Complete the form below with information related to the progress note session.

Type <b>required</b>	Client Attended?
--None--	<input type="checkbox"/>
Location <b>required</b>	Location Type <b>required</b>
	--None--
Start Time <b>required</b>	Start Date <b>required</b>
--None--	[ 8/22/2012 ]
Duration Minutes <b>required</b>	Duration Hours <b>required</b>
0	0
	Relates to Support Network?
	<input type="checkbox"/>

Notes

**B I U** **abc**

(Figure E)

★ Please **note** that to get back to your referral after filling out progress notes or focus areas, use the “return to Referral” link depicted in (Figure F) below.

SPOA SPOA : CTI Service Plan print Service Pla **return to Referral** Contact Support

### Service Plan

Created by: SPOA Agency X Supervisor  
Last Modified by: SPOA Agency X Supervisor

Projected Phase Start Date 8/22/2012	<b>Actual Phase Start Date 8/22/2012</b>	Projected Phase End Date 10/21/2012	Actual Phase End Date
---	--	--	-----------------------

(Figure F)

## Section 9.0: Making a Referral

[\(Main Menu\)](#)

After clicking the [Submit a Referral](#) link on either your private or public SPOA referral page, you will be put through to the SPOA Referral Wizard.

Here, the first choice you will make is whether you want to refer the individual for *Care Coordination* or *Housing*, then select the options for *Care Level*, *Care Status*, and/or the client's current state of housing after you chose a referral type- and then click [Next](#). The referral type options and explanations for both choices, or new choices, are shown as follows:

The screenshot displays the 'SPOA Referral Wizard' interface. At the top, the browser address bar shows the URL: [https://familyfirst.secure.force.com/spoa/spoa2\\_wizard\\_start?sObjectType=Encounter\\_c](https://familyfirst.secure.force.com/spoa/spoa2_wizard_start?sObjectType=Encounter_c). The page title is 'SPOA Referral Wizard' and includes a 'Referral Code: ?' and a 'return Home' link. A 'Contact Support' link is also present in the top right.

### Introduction

Public Referrals have gone through a slight change to help the users. Referrals can now be re-accessed if you need to come back at a later time to complete them.  
**Note:** Referral Code to load is located in the Navigation bar after you start the referral.  
**Note:** For security, referrals will lock after 2 hours, please use the referral code to unlock them.

I need to add a client who is already Enrolled / Engaged with my Agency ?

**Requested Care**

- Care Coordination**  
This client needs assistance related to mental and behavioral health services.
- Housing**  
This client needs assistance related to housing. The client may already be homeless or at risk of homelessness.

**Navigation Menu:**

- Introduction
- Referrer
- Client
- Financial Responsibilities
- Income Sources
- Capabilities
- Risk Assessment
- Insurance
- Diagnosis
- Hospital / ER
- Alcohol / Substances
- Medication
- Education
- Employment
- Living Location / History
- Previous Services
- Final Review
- Attachments

**next**

The next progressive section is the **Referrer** information section and you will see it highlighted on both, the top of your page and in your overall referral progress section. Here you will fill out information about yourself as a referrer.

- ★ Please **note** that the Organization input box will be auto-filled with your organization if you are not a public referrer.
- ★ Please **note** that you now have both a [Previous](#) and [Next](#) button, and they can be used to navigate between sections of the referral.
- ★ Please **note** that **if you are a public referrer**, you are given 2 hours to complete a referral, and if you time out or otherwise leave the page, you will need to have the **Referral Code** highlighted below in red to retrieve your referral. The link to do so will be present next to the [Submit a Referral](#) link on the public referral page.

The overall section will look like the following:

The screenshot shows a web browser window with the URL [https://familyfirst.secure.force.com/spoa/spoa2\\_wizard\\_referrer?id=a0HA0000009bJdIMAE](https://familyfirst.secure.force.com/spoa/spoa2_wizard_referrer?id=a0HA0000009bJdIMAE). The page title is "SPOA Referral Wizard" and the referral code "0009bJdI" is circled in red. The "Referrer" section is highlighted with a blue circle and a blue arrow. The "Referral progression section" is highlighted with a blue dashed box and a blue arrow. The "previous" and "next" buttons are circled in blue and have blue arrows pointing to them. The form includes fields for First Name (required), Last Name (required), Organization (required), Title, Phone, and Email. A sidebar on the left lists various sections, with "Referrer" selected and highlighted in blue.

The next progressive section is the **Client** information section. Here you will fill out the *demographic*, *contact*, *race*, *language*, *child*, and *marital status* questions about your client.

★ Please **note** that you will also have a *housing information* section on this form at the bottom if you have chosen to make a referral for Housing or for both Care Coordination and Housing simultaneously.

The overall section will look like the following:

The screenshot shows a web browser window with the URL [https://familyfirst.secure.force.com/spoa/spoa2\\_wizard\\_client?id=a0HA000009bJk1MAE](https://familyfirst.secure.force.com/spoa/spoa2_wizard_client?id=a0HA000009bJk1MAE). The page title is "SPOA Referral Wizard" and the referral code is "0009bJk1". The main heading is "Client".

**Note:** You must enter either a Date of Birth or a Social Security Number.

Please note that these questions are designed to aid in linking each person with the most appropriate housing program and will in no way affect the ability to gain housing through SPOA.

**Demographics**

First Name **required**  M.I.  Last Name **required**

Date of Birth  Social Security Number

Format: MM/DD/YYYY ie: 05/15/1980 Format: XXX-XX-XXXX

Gender

US Citizen?  Citizenship Details

The left sidebar contains a navigation menu with the following items: Introduction, Referrer, Client (highlighted), Financial Responsibilities, Income Sources, Capabilities, Risk Assessment, Insurance, Diagnosis, Hospital / ER, Alcohol / Substances, Medication, Education, Employment, and Living Location / History.

(Continue)

The next progressive section is for **Financial Responsibilities** information. Here you will select whether the client has financial responsibilities, and then what kinds if you select that they do; such as *Housing* or *Student Loans*.

★ Please **note** that you will be able to add as many financial responsibilities as desired- but the option to add more only appears after you record the first.

If you select that the client does have responsibilities, the next step looks like the following:

## Financial Responsibilities

Type	Frequency	Amount	
<input type="text" value="-None-"/>	<input type="text" value="-None-"/>	<input type="text"/>	<input type="button" value="delete"/>

The next progressive section is for **Income Sources** information. Here you will select whether the client has income sources, and then what kinds if you select that they do; such as *Alimony* or *Bank Accounts*.

★ The section looks just like the previous Financial Responsibilities section did.

The next progressive section is for **Capabilities** information, where you enter your client's functional strengths and deficits. With which you will rank the level of independence or lack thereof of your client with regards to things like managing personal *hygiene*, *grocery shopping*, or *ability to independently take medication as prescribe, etc.*

The overall section is depicted on the next page:

(Continue)

**Functional Strengths and Deficits**

Does Applicant Currently...	Independently	Needs Help	Unable	Unknown
Manage personal grooming	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Manage personal hygiene	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Manage personal laundry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Budget Money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Respond appropriately to emergency situations e.g. Fire	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Respond appropriately to emergency situations e.g. First Aid	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comply with medication regimen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Use public transportation and other community resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Plans menus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Grocery shops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Prepares meals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Ability to independently take medication as prescribed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

The next progressive section is for **Risk Assessment** information with application to both Self and/or Others. Here you will enter information such as that of any history of assault, setting fires, suicide attempts or other self-harm.

- ★ Please note that you will have to fill out this entire form, and specifically indicate that a client has had no known episodes of the series of types listed- by clicking on either the No, or Don't Know option.
- ★ Please **note** that for the sake of monitoring for emergencies or trends, during referral each client is assigned a risk score as they move through the system. Much of this risk score comes from the history attributions you record in this section. Dependent on the level of the score, in relevance to others being evaluated, it may change a client's standing with respect to necessity for quicker placement. The broader the history of relevant events you give, the greater the chance of expediency.
- ★ Please **note** that you will be given the opportunity to enter the details of the history after selecting that it applies to the client. The section where you will fill

this in will be in the Details section that highlights as orange, after selecting the applicable “Yes” to the applicable history piece.

The overall section will look like the following:

**Potential Risk to Self / Others**

Please indicate any areas that the individual may have that could put this individual in danger of harming themselves or others. Please select no if there are no such incidents for that topic, and Don't Know if you are unsure if there may be an incident. If you select yes, you will be required to follow the details button and fill out more information regarding it. If the details button is **Orange**, you have not yet completed the details section. If it is **Green**, you have completed the details for that single incident.

- Introduction
- Referrer
- Client
- Financial Responsibilities
- Income Sources
- Capabilities
- Risk Assessment**
- Insurance
- Diagnosis
- Hospital / ER
- Alcohol / Substances
- Medication
- Education
- Employment
- Living Location / History
- Previous Services
- Housing Selection
- Final Review
- Attachments

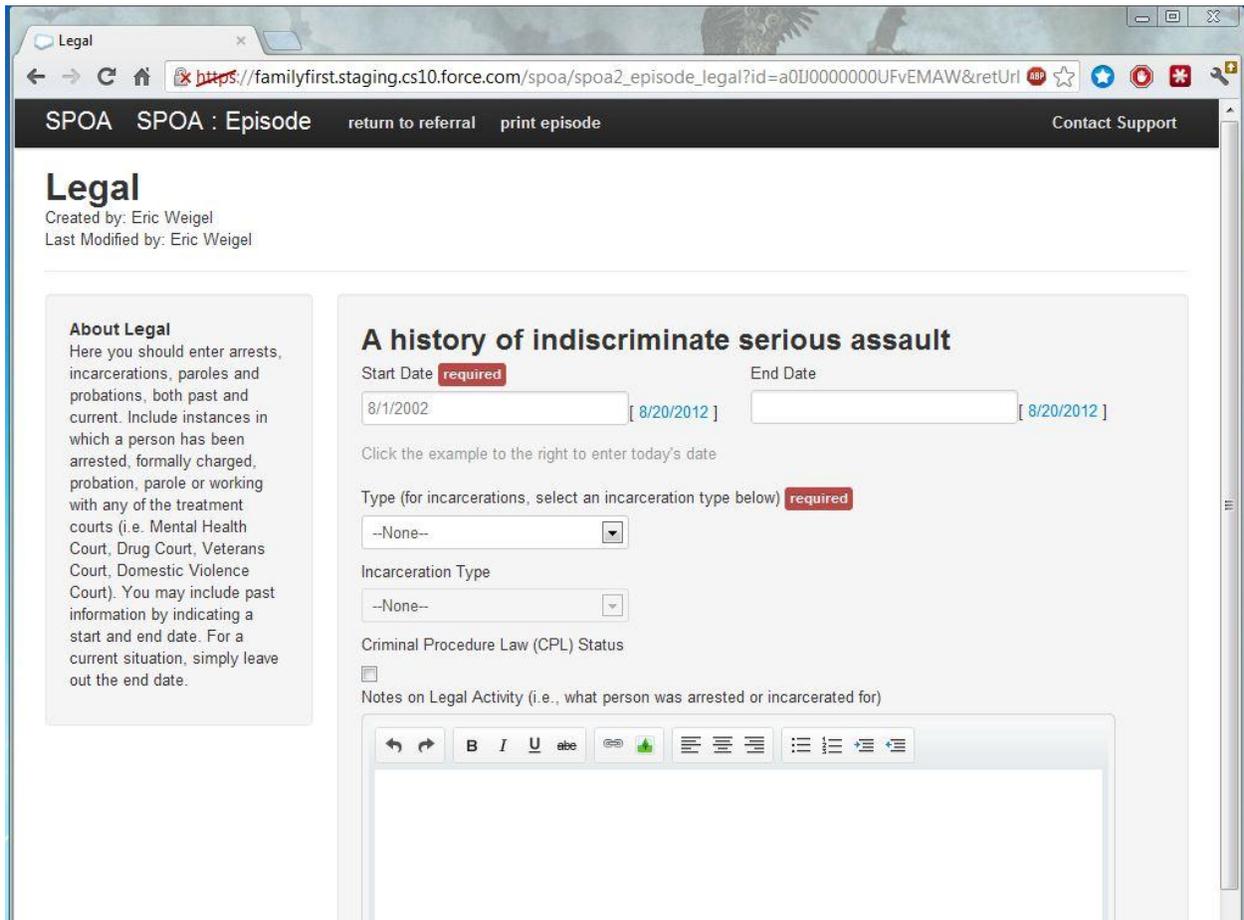
A history of indiscriminate serious assault		
Please Select One	Start Date	
Yes <input type="radio"/> No <input type="radio"/> Don't Know <input type="radio"/>	<input type="text"/>	Details delete
<input type="button" value="add"/>		

A history of arrests and dispositions		
Please Select One	Start Date	
Yes <input type="radio"/> No <input type="radio"/> Don't Know <input type="radio"/>	<input type="text"/>	Details delete
<input type="button" value="add"/>		

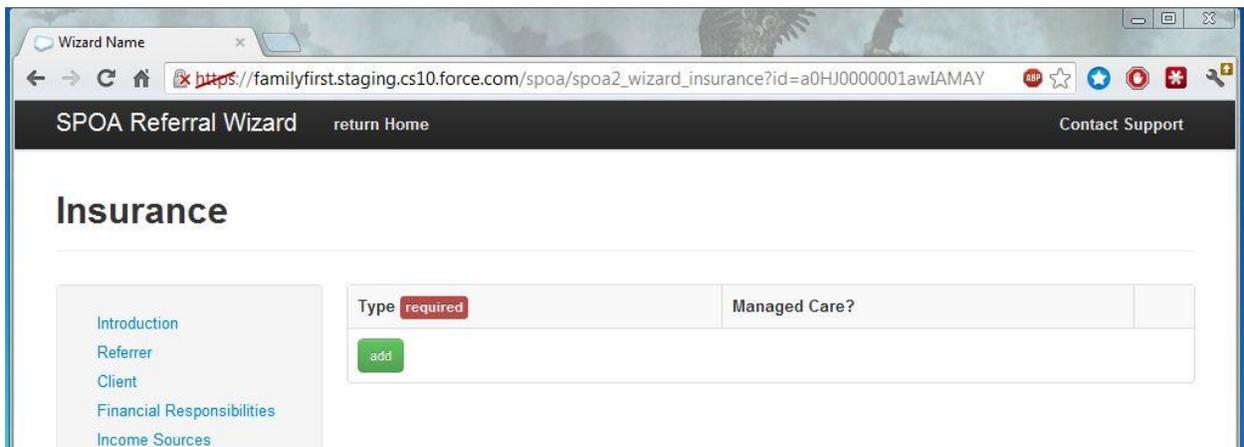
A History Of Setting Fire		
Please Select One	Start Date	
Yes <input type="radio"/> No <input type="radio"/> Don't Know <input type="radio"/>	<input type="text"/>	Details delete

Adding details to such an event is depicted on the next page:

(Continue)



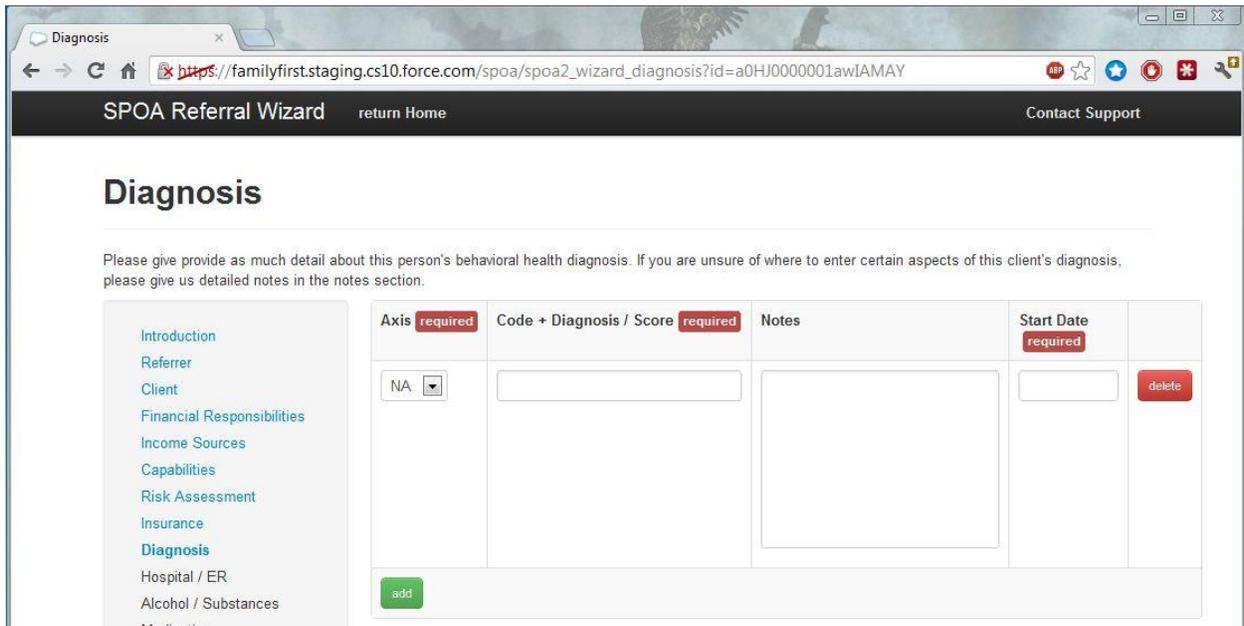
The next progressive section is for **Insurance** information, and it is pretty straight forward and brief. For demonstration purposes it looks like the following:



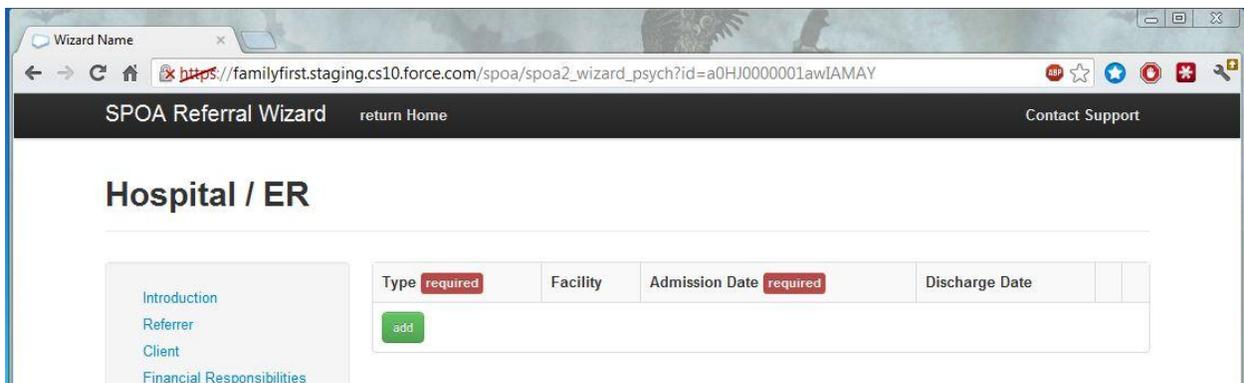
The next progressive section is for **Diagnosis** information. This applies to the individual's official behavioral health diagnoses.

★ Please **note** that at least one diagnosis must be entered.

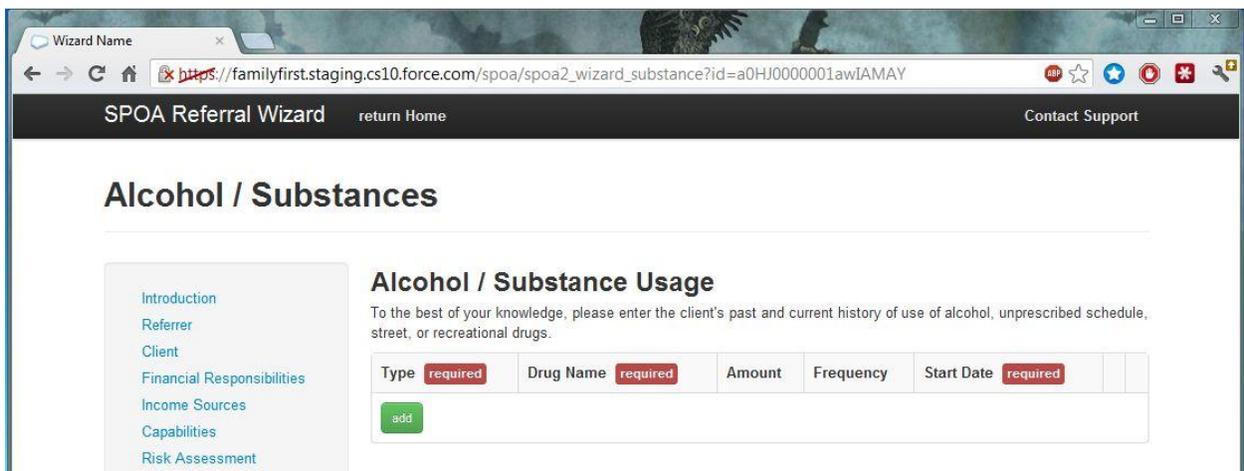
This section is depicted on the next page:



The next progressive section is for **Hospital / ER** information. This information is entered episodically, like many other sections, and looks like the following:

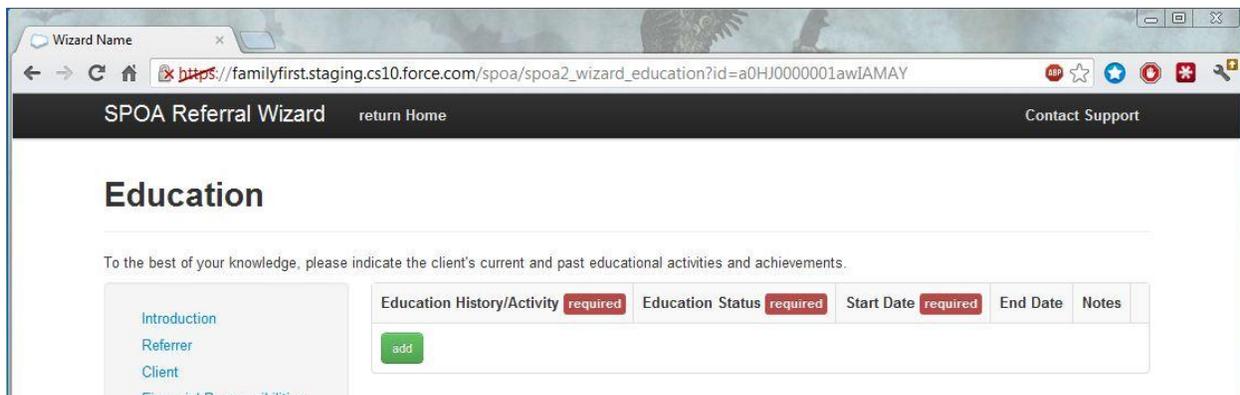


The next progressive section is for **Alcohol and Substance** information. If you select Yes, the section looks like the following:



The next progressive section is for **Medication** information section. If you select Yes, the section looks the same as the above section for Alcohol & Sustances.

The next progressive section is for **Education** information. This section is historic, with episodes you can enter for long into the past, or today. If you select Yes, the section looks like the following:



The screenshot shows a web browser window titled "Wizard Name" with the URL "https://familyfirst.staging.cs10.force.com/spoa/spoa2\_wizard\_education?id=a0HJ0000001awIAMAY". The page header includes "SPOA Referral Wizard" and "return Home" on the left, and "Contact Support" on the right. The main heading is "Education". Below the heading is a instruction: "To the best of your knowledge, please indicate the client's current and past educational activities and achievements." On the left side, there is a sidebar menu with links: "Introduction", "Referrer", "Client", and "Financial Responsibilities". The main content area features a table with the following columns: "Education History/Activity" (with a red "required" tag), "Education Status" (with a red "required" tag), "Start Date" (with a red "required" tag), "End Date", and "Notes". A green "add" button is positioned below the "Education History/Activity" column.

The next progressive section is for **Employment** information. This section is historic, with episodes you can enter for long into the past, or today. If you select Yes, the section very much like the above Education section.

The next progressive section is for **Living Location & History** information. This section is historic, with episodes you can enter for long into the past, or today. This section looks and functions very much like the above Education section.

★ Please **note** that for special situations such as homelessness, you could place more information in the Details sections next to each living location you enter- such as the individual's typical places, like cross streets.

The next progressive section is for **Previous Services** information. This section is historic, with episodes you can enter for long into the past, or today. If you select Yes to either option, this section looks and functions very much like the above Education section.

The next progressive section is for **Housing Selection**. This section is for choosing which appropriate housing you would like to submit your housing referral for, if you chose that as an option for the type of referral in the beginning.

This section is depicted on the next page:

Wizard Name

← → ↻ ⌂ [https://familyfirst.staging.cs10.force.com/spoa/spoa2\\_wizard\\_housing\\_selection?id=a0HJ000001awIAMAY](https://familyfirst.staging.cs10.force.com/spoa/spoa2_wizard_housing_selection?id=a0HJ000001awIAMAY)

**SPOA Referral Wizard** [return Home](#) [Contact Support](#)

Choose from the following organizations for your housing options. Please note that Applicants may choose to live anywhere within Erie County. The location of a Housing Provider's offices does not limit where a client may be placed.

[Introduction](#)  
[Referrer](#)  
[Client](#)  
[Financial Responsibilities](#)  
[Income Sources](#)  
[Capabilities](#)  
[Risk Assessment](#)  
[Insurance](#)  
[Diagnosis](#)  
[Hospital / ER](#)  
[Alcohol / Substances](#)  
[Medication](#)  
[Education](#)  
[Employment](#)  
[Living Location / History](#)  
[Previous Services](#)  
**[Housing Selection](#)**  
[Final Review](#)  
[Attachments](#)

Check the box if Consumer will accept first available opening regardless of housing provider.

Select a Housing type to filter by. Based on your selection the housing subtype will also then become available.

Housing Type:  Housing Subtype:

	Type	Subtype	Organization
<input type="checkbox"/>	Licensed	Supervised Community Residence (SCR)	<b>DePaul Community Service</b> 2240 Old Union Road Cheektowaga, NY 14227 Phone: Fax:
<input type="checkbox"/>	Licensed	Treatment Supervised Apartment (TSA)	<b>CMI - Choices</b> 1570 Buffalo Ave. Niagara Falls, NY 14303 Phone: Fax:

The next progressive section is for **Final Review**. This section is from where you will be able to see all the information you've entered in the above sections one-by-one- and from where you will be able to review and edit any choices before choosing to submit, via the Submit button at the bottom right of the page. If you have not completed all the required information, this button will be **Red**; otherwise it will be **Green**.

- ★ Please **note** that any necessary consent forms must be attached to the referral via the Attachments link, located below the Final Review progression step, in your progression list to the left on your screen.
- ★ Please **note** that certain sections with incomplete information will be highlighted here and you will be required to choose whether the information being asked for is applicable or not.

A successful submittal will end on a screen such as this one:

Home

← → ↻ ⌂ [https://familyfirst.staging.cs10.force.com/spoa/spoa2\\_home?successMsg=Your+Referral+was+successfully+submitted](https://familyfirst.staging.cs10.force.com/spoa/spoa2_home?successMsg=Your+Referral+was+successfully+submitted)

**SPOA** [LOGIN](#) [Submit a Referral](#) [Contact Support](#)

**Welcome to SPOA**

**Success!**  
 • Your Referral was successfully submitted

## **Section 10.0:** Contacts

[\(Main Menu\)](#)

- For the Erie County SPOA office, please contact Tara Karoleski, at:  
<mailto:Tara.Karoleski@erie.gov>